

# YEAR IN REVIEW | 2013



Office of Tourism



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**“Far and away the best prize that life has to offer is the chance to work hard at work worth doing.”**

*~Theodore Roosevelt*



## MESSAGE FROM THE EXECUTIVE DIRECTOR

Our nation's 26th president said it perfectly, “...work worth doing.” Even though he shared this philosophy nearly a century before us, I assure you that the entire team here at the Wyoming Office of Tourism is proud to work hard because this truly is work worth doing. Many times, when explaining the work of tourism marketing, I often say “We get to take the very best that Wyoming has to offer and put it out there for the rest of the world to see.” And, as is evidenced by the results of our efforts, the rest of the world absolutely loves what they see!

It is always fun to look back on the year just passed and this year was no different. When reflecting on 2013, I believe it is best summarized as a **Year of Constant** and a **Year of Change**.

### A YEAR OF CONSTANT

Our product has withstood the test of time as Wyoming is noted for some of the world's most iconic destinations – Yellowstone and Grand Teton National Parks and Devils Tower National Monument. The world's love affair with the American cowboy remains high and our friendly western hospitality does not disappoint. In addition, the foundation of our marketing strategy continues to yield impressive results.

In 2013 **9.07 million visitors (up 5%)** enjoyed Wyoming. Those 9.07 million **visitors spent \$3.2 billion dollars (up 3%)** buying goods and services from Wyoming businesses. That's new money being pumped into the cash registers on main streets across our state. In turn, that \$3.2 billion **generated \$143 million in local and state tax revenues (up 11.5%)**. Local lodging tax collections were also up 5%, enhancing the marketing capacity of local communities. **The leisure and hospitality sector accounts for 10% of all state sales tax collections**, 1 of only three sectors in double digits.

Overall, this industry continues to be a strong and thriving industry for Wyoming. In fact, in 2013, **3.9% of Wyoming's Gross Domestic Product is attributable to travel and tourism, up from 3.0% last year**. That's a 30% increase!

### A YEAR OF CHANGE

Last March we began our journey through an organizational assessment with the ultimate goal of achieving organizational excellence. It was a long, rewarding process but I can tell you, standing on the this side and reflecting back, I am more confident than ever that it was needed and was a most worthy endeavor.

Our **Strategic Clarity** document identifies the strategic anchors which guides our every decision **1) Grow Wyoming's visitor economy 2) Maximize the impact of our partnerships 3) Champion the destination and the Brand (internationally and domestically) and 4) Ensure Operational Excellence**. In the accompanying **Operational Plan**, necessary actions on how to best achieve the measurable goals within the next three years have been defined. We've thought boldly and planned aggressively!!

The most pivotal change came with our **Organizational Restructuring**. Understanding that structure lives in service to strategy, we have been reconfigured into four primary areas of focus; Global Sales and Services, Strategic Partnerships, Brand Studio and Business Operations.

In summary, all of this is about the work. The work worth doing. In 2013, I celebrated 10 years with the Wyoming Office of Tourism. Without a doubt, this journey has been the most rewarding in my professional career. Looking forward, I am more excited than ever about where our efforts will take us. Together, we are sure to enjoy the benefits of this work for many years to come.

My best,

Diane Shober,  
Executive Director, Wyoming Office of Tourism





# WYOMING: TRULY FOREVER WEST

**T**he Wyoming Office of Tourism is the only statewide organization dedicated to growing Wyoming's tourism economy. In everything we do, we seek to capture the majestic beauty, the untouched wildlife, the rustic western culture, and the adventurous, untamed spirit of Wyoming. Communicating that simple, yet profound authenticity of Wyoming yields a tremendous positive result on our economy and our state as a whole. It is because of that we continuously strive for peak performance in both brand experience and marketing outreach.

## 2013 TRAVEL-GENERATED IMPACTS

(Year to year comparison: 2013 to 2012 Travel Impacts)

### VISITOR VOLUME

9.07 Million Overnight Visitors ↑ 4.6%

### VISITOR SPENDING

\$3.18 Billion Direct Expenditures ↑ 2.9%


### TAXES

\$143 Million in State & Local Taxes ↑ 11.4%

### JOBS

 30,860 jobs supported ↑ 1.2%

Each Wyoming household would pay **\$540** more in taxes without the tax revenue generated by tourism industry in Wyoming.

 =10,000 jobs

# IMPACT, RESULTS & TRENDS

## PRELIMINARY TRAVEL IMPACTS

Preliminary Travel Impacts Statewide (Expenditures, Receipts and Income in Millions)

	2006	2007	2008	2009	2010	2011	2012	2013	2012-13 p % Change
Overnight Visitors	7.3	7.3	7.31	7.33	8.0	8.34	8.64	9.07	4.6%
Expenditures	\$2,562	\$2,751	\$2,931	\$2,501	\$2,661	\$2,883	\$3,102	\$3,187	2.9%
Tax Receipts	\$104	\$111	\$116	\$109	\$111	\$118	\$128	\$143	11.4%
Payroll Income	\$639	\$694	\$732	\$704	\$711	\$729	\$761	\$786	2.6%
# of Jobs	30,430	30,960	31,430	30,030	29,740	29,810	30,500	30,860	.8%

Source: Dean Runyan & Associates, Strategic Marketing & Research, Inc.

## ADVERTISING EFFICIENCY

A measure of the resourcefulness of the media buy

	2010	2011	2012	2013
Targeted Households	88,691,191	92,864,614	92,276,863	94,445,520
Awareness	40%	29%	41%	38%
Aware Households	35,033,020	26,586,467	38,272,588	35,826,709
Spending	\$5,147,692	\$4,539,541	\$5,542,918	\$5,380,195
Cost per aware Household	\$0.15	\$0.17	\$0.14	\$0.15

Source: Strategic Marketing & Research, Inc. 2013 Advertising Effectiveness Study

## ECONOMIC IMPACT

Travel directly attributed to the advertising campaign

Total Economic Impact	2010	2011	2012	2013
Incremental Trips	419,498	543,626	542,120	527,935
Repeat Trips	-	40,066	52,078	57,215
Total Influence Trips	419,498	583,659	594,218	661,798
Spending Per Party	\$914	\$1,116	\$1,118	-
<b>Economic Impact</b>	<b>\$365,521,548</b>	<b>\$651,410,217</b>	<b>\$685,845,643</b>	<b>\$722,683,566</b>
Expenditures	\$5,134,465	\$4,539,541	\$5,632,822	\$5,380,195
ROI	\$71	\$143	\$122	\$134
Taxes Generated	\$14,986,383	\$26,707,819	\$28,119,671	\$29,630,026
Tax ROI	\$2.92	\$5.88	\$4.99	\$5.51

Source: Strategic Marketing & Research, Inc. 2013 Advertising Effectiveness Study





Core Print Advertising

# ADVERTISING CAMPAIGNS

## ROAM FREE: Core



Core TV Spot

To generate awareness in our core markets, we tugged on America's heartstrings with messaging that resonates with people looking for an experience, transporting them back to a much simpler, more adventurous time. Using the timeless voice of Robert Duvall, and the free spirited nature of a child, we instilled the desire to experience the fullness of the western spirit in a place where freedom still reigns supreme: Wyoming. Our core campaigns focused on the more prominent sites in Wyoming, capturing the attention of viewers with spectacular sights like those of the Grand Tetons and the Devils Tower.

## GREAT AMERICAN ROAD TRIP: Adjacent



Interactive Map

In an effort to ignite the spontaneous and fun-loving nature in our adjacent markets, we developed an interactive map aimed to entice visitors to effortlessly explore our state for both quick weekend trips and extended vacations. The map capitalized on the road tripper's mindset by highlighting all the hidden gems found along four Wyoming roads en route to our iconic national parks. A partner campaign for the adjacent market was developed to highlight unique Wyoming adventures through a series of collectible stickers. This campaign enticed visitors to stop by the welcome centers to extend their length of stay.



# STRATEGIC PARTNERSHIPS

The Strategic Partnerships department serves Wyoming by proactively developing relationships that will impact Wyoming's visitor economy. This is achieved through film, destination development, and visitor services. The film department builds relationships with the film industry through incentives to elevate the Wyoming brand's exposure through television and film. Destination development focuses on creating tourism and recreation related initiatives between the federal, state, and tribal agencies to foster relationships and ongoing communication between industry partners. And finally, visitor services cultivates a strategy for all visitor center programs geared toward providing exemplary customer service and increasing visitors' length of stay in Wyoming.

## HIGHLIGHTS

- Film Industry Financial Incentive (FIFI) applications increased 100%
- The "Longmire" sweepstakes had a large viewership and participation rate. "Longmire Days" hosted in Buffalo drew more than 5,000 visitors to town for the four-day event
- The film "Nebraska," that was shot in Wyoming was released in November.
- Community assessments for Wheatland, Kaycee, Story, Greybull and Green River
- Continued interpretative plan for Wind River Indian Reservation to be completed fall 2014
- Southeast Wyoming Visitor Center opened in Oct. 2012 saw an increase of visits by 134%

# GLOBAL SALES & SERVICES

Existing to leverage Wyoming as an ideal destination among international travelers, the Global Sales and Services team works to foster relationships and partnerships with Brand USA, travel trade, media and other strategic connections from all over the world. This team travels regularly, participating in trade shows and sales missions, and conducts familiarization tours in order to generate awareness for Wyoming to be our international markets' destination of choice.

## HIGHLIGHTS

- Met with 140 travel professionals in Australia & New Zealand
- 79 leads from travel trade in the Netherlands & Belgium
- Produced two in language videos with Brand USA
- Participated in a Scandinavian sales mission reaching 76,000 customers reached and generating 225 leads
- 15 total trade FAMs totaling 103 participants from eight countries



# BUSINESS OPERATIONS

The Business Operations department works to offer superior customer service to everyone who inquires about visiting Wyoming. This team greets thousands of visitors each year and provides helpful information to those planning a Wyoming vacation. This team also works diligently to maintain an accurate account of all financial records and developing and maintaining WOT's budget. Business Operations is also charged handling all inventory and facility maintenance. This staff provides excellent operational assistance to the entire Wyoming Office of Tourism in order to support the brand and its marketing initiatives.

## HIGHLIGHTS

- Experienced operational success
- Greeted thousands of visitors as the voice of Wyoming
- Achieved a successful audit without any financial discrepancies
- Began planning an enterprise fund for WOT
- Analyzed opportunities for improved efficiency with expanded department

# BRAND STUDIO

The Wyoming Office of Tourism's Brand Studio is currently comprised of seven creative individuals that seek to identify and evolve the Wyoming Brand into something that evokes an emotional connection and encourages participation with Wyoming's culture, wildlife, and sense of adventure. The studio aims to achieve this through six vital venues: media and public relations, interactive marketing, content development, creative services, visual assets, and research. The Brand Studio collectively works to maximize these areas by channeling a compelling brand narrative that is accessible, engaging, and unique to Wyoming.

## HIGHLIGHTS

- Mobile site visits increased 392%
- Web visits increased by 28%
- Reskin of the WOT Film website
- Redesign of Wyoming Roundup, Rodeohand and Film blog
- Fans increased to more than 100,000 on the official WOT Facebook page
- Public Relations organized 31 separate familiarization (FAM) tours for media and journalist to various locations throughout the entire state
- FAMs totaled 49 journalists
- Participated in the largest trade and media show in the US, IPW-the travel industry's premier international marketplace

## Generating Incremental Travel







# OPERATIONAL EXCELLENCE



Recently, the Wyoming Office of Tourism underwent a strategic process of restructuring in order to better reflect the office's new strategic plan and foster a culture more conducive to progressive and innovative approaches within the tourism industry. The reorganization sought also to leverage the talent and unique perspectives within the office and allow the team to better grow the tourism economy. Other focuses of the restructure were to ensure operational excellence across all platforms and champion the Wyoming brand in a powerful, more effective way than ever before.

As a result of the restructure, changes include an expanded Business Operations department and the creation of the Brand Studio to supply creative, interactive and research services. Global Sales and Services, previously Travel Trade, has also expanded, while Visitor Services, Film, and Destination Development joined forces together to comprise the Strategic Partnership department.

## BUSINESS OPERATIONS

**Anita Benton, Director of Business Operations**

Angelina Cisneros, Business Services Coordinator

Jackie Cole, Business Services Coordinator

Vicki Morris, Business Services Senior Coordinator

Amanda Roberts, Accounting Manager

## BRAND STUDIO

**AnnDrea Boe, Director of Brand Strategy**

Kaitlyn Anderson, Content Marketing Manager

Carrie Lockwood, Marketing Services Senior Coordinator

Darin Lundberg, Interactive Marketing Manager

Mike McCrimmon, Visual Assets Manager

Chris Mickey, Media & Public Relations

Lesley Rowbal, Creative Services Manager

## STRATEGIC PARTNERSHIPS

**Michell Howard, Director of Strategic Partnership**

LeeAnne Ackerman, Northeast Welcome Center Supervisor

Steve Kelso, Southeast Welcome Center Supervisor

Kristin Phipps, Destination Development Manager

Kathaleen Spencer, Welcome Center Specialist

Shannon Stanfill, Visitor Services Senior Manager

Colin Stricklin, Film Production Senior Coordinator

## GLOBAL SALES & SERVICES

**James Scoon, Director of Global Sales & Services**

Kandi Ames, Americas Market Development Manager

Monica Taylor-Lee, Asia Market Development Manager



Office of Tourism

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